Purpose: This dashboard provides unit finance managers with a performance management tool to monitor Expense Request rejection activity.

Running a Report

Follow these steps to run and review predefined financial reports in OBI.

1. Go to [http://bi.stanford.edu](http://bi.stanford.edu) and log in using your SUNet ID and password.
2. Go to the "Dashboards" menu and select "Expense Requests and SU Card Activity" under the Finance section. On the Home tab, select Expense Request Efficacy Dashboard link.
3. There are four tabs on the dashboard: Select a report category from the tabs.

4. Enter selection criteria being sure to follow any instructions at the top of the section.

- Note the information about mandatory fields and guidelines above the selection criteria.
- For best accuracy and system performance, use the Search feature in the drop-down menus, especially for any Organization code, since the “Organization” field requires a combination of Org code and name.
- "Apply" searches based on the information entered into the fields.
- The Reset button provides a drop-down menu with three options: "Reset to last applied values", "Reset to default values" or "Clear All".

5. Click Apply. The report(s) will run.
Interactive features

ER Rejection Stats – High level view of the approval ratio for the entire organization or children organizations by transaction types. Rejection Reason Type focuses on areas for improvement by Rejection Reason Codes.
Expense Request Efficacy (ERE) Dashboard

Quick Start Guide

Expense Request Rejections by Reject Reason Code or by Preparer and Rejections by ER Type.

Displays pie chart view of Expense Request Transactions by "Expense Request Transaction Type Name" by Rejected, Not Rejected and Percent.

Rejections sorted by Reject Reason Code or by Preparer
Expense Request Efficacy (ERE) Dashboard
Quick Start Guide

ER Rejection Detail by Employee – 3 Reports here: Expense Request Approval Frequency by Preparer, Expense Request Approval Frequency by Approver and Expense Request Approval Frequency by Supplier. Focused on opportunities for process improvement.
Expense Request Aging – By Submitted and Posted Dates. Submit Date goes back to the Preparer and/or Organization. Posted Date goes back to the Organization.
Expense Requests in Range – a range of Expense Requests (ER) by Submitted Dates and Minimum/Maximum ER Amounts.

Expense Transactions by minimum or maximum amounts. (Default is 0.00 to 100.00)

Expense Requests between $0 and $100

Can drill down to 2 Options:
1. Drill to Expense Request Approval
2. Drill to Expense Request Dashboard

Export Options
Print Options
PDF
Excel 2007+
Powerpoint 2007+
Tab delimited Format
CSV Format
Web Archive Link
XML Format